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World Production and Trade

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Weekly Roundup

WR 8-84

Feb. 23, 1984

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

With record wheat export availabilities this season, AUSTRALIA continues to push wheat aggressively in the world market. Most recently, the Australian Wheat Board reportedly offered 100,000 tons of wheat, or roughly U.S.\$15 million worth, to Ecuador. Reportedly, the Board is offering two-year credit with equal payments every six months and an interest rate at the London Interbank Offer Rate plus one-fifth of a point. In the past, Australia supplied Ecuador with some barley and oats. However, if accepted, this could mark the first Australian wheat sale to Ecuador in more than 15 years. Ecuador has imported about 300,000-350,000 tons of wheat annually, virtually all of it from the United States.

BRAZIL recently tendered for an additional 150,000 tons of corn, half U.S. and half Argentine origin. Since December, when Brazilian corn purchases began, Brazil has bought 230,000 tons of Argentine corn and about 125,000 tons from the United States. Apparently these were all cash purchases and additional buying is expected. The Brazilian corn crop is below previous expectations and Brazil is likely to import a total of about 500,000 tons in October-September 1983/84. Brazil had imported as much as 1.5 million-1.7 million tons of corn annually in the 1978/79-1980/81 October-September period. Brazil had been striving to return to the position of a net corn exporter, having exported as much as 1 million-1.5 million tons annually in previous years.

Inadequate rainfall for MOROCCO's winter grain crops could mean another year of large grain imports. Widespread rains in the near future could turn the situation around, though there is little prospect for a normal crop. Last year's total crop, largely wheat and barley, is estimated at around 3.5 million tons, compared with an average harvest ranging between 4 and 5 million tons annually. Morocco is expected to import around 2.4 million tons of grain in 1983/84 (July/June), consisting almost entirely of wheat. So far in 1983/84, Morocco has purchased close to 1 million tons of U.S. wheat. The United States usually supplies well over half of Morocco's wheat imports, with the European Community (EC) also providing a large share.

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LYNN KRAWCZYK, Editor, Tel. (202) 382-9442. Additional copies may be obtained from FAS Media and Public Affairs Branch, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.

ARGENTINA has closed wheat export registrations after concluding a 500,000-ton sale to Iran. This is not an unusual action, and indicates that Argentina has essentially committed exportable wheat supplies and is now concerned about ensuring sufficient supply to cover domestic needs. There have been occasions in the past when Argentina oversold the wheat crop, necessitating some imports. Closing export registrations is a precaution to avoid this. Argentine wheat exports are forecast to reach 7.6 million tons in the December-November 1983/84 marketing year. The USSR was once again Argentina's largest wheat buyer, reportedly purchasing about 3.5 million tons. Iran has bought over a million tons, and Brazil was also a major buyer, with purchases of 750,000 tons. China, on the other hand, was notably absent from the Argentine grain market this season, after purchasing 3 million tons from last season's crop. With registrations closed, only small additional sales are likely to take place.

Drought for the third consecutive season may again reduce this year's corn crop in ZIMBABWE. Usually an exporter of several thousand tons annually, Zimbabwe may have to import as much as 500,000 tons of corn this year to meet basic food needs. Much depends, however, on rainfall over the next several weeks. In preparation for a low outturn, the government is attempting to build up stocks by instituting an early delivery incentive payment scheme. Bonus payments that diminish with time will be paid on top of the government's base purchase price.

In addition, long-term silo construction projects are scheduled. These will raise Zimbabwe's bulk corn storage capacity to 428,000 tons, or about 20 percent of the annual average crop of around 2 million tons.

OILSEEDS AND PRODUCTS

FISHMEAL EXPORTERS ORGANIZATION (FEO) COUNTRIES' output and trade of fishmeal dropped sharply in calendar 1983. The summarized data below show production, exports and stocks in 1983 down by 26 percent, 31 percent and 17 percent, respectively. The data are as follows in 1,000 tons:

Country	-----Jan-Dec 1982-----			-----Jan-Dec 1983-----		
	Production	Exports	Ending Stocks	Production	Exports	Ending Stocks
Chile	636	681	146	601	618	119
Iceland	51	66	5	67	46	20
Norway	277	223	52	341	267	66
Peru	618	618	93	155	163	41
Total	1,582	1,588	296	1,164	1,094	246

During December 1983, fishmeal exports by the FEO countries, at 85,000 tons, declined by 49 percent from the same month a year ago. Fishmeal production in December, at 45,000 tons, was down about two-fifths from the same month in 1982. During the month of December 1983, combined fishmeal stocks in the FEO countries declined by 16 percent or 47,000 tons.

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During January 1984, fishmeal prices, basis Europe, at about \$480 per ton, were only 9 percent above the same month last year. Reduced fishmeal supplies resulted in only a slight gain in the fishmeal/ soybean meal price ratio to 1.89 to 1.0 compared with 1.84 to 1.0 a year ago.

During the week ending February 2, outstanding export sales of soybean oil from the United States to PAKISTAN doubled from the previous week's level to 82,200 tons. The increased export sales activity to Pakistan is linked to high palm oil prices that currently prevail in the international vegetable oil market. Because of Pakistan's increased purchasing of soybean oil, Pakistan's imports of soybean oil during 1983/84 may exceed last year's import level of 241,000 tons. A recent development that will facilitate Pakistan's importing more soybean oil was the Ghee Corporation's revised vegetable oil blending requirement. The new blending specifications allow up to 80 percent soybean/cottonseed oil and 20 percent palm oil. Since cottonseed oil supplies in Pakistan are sharply below last year, soybean oil will probably be the principle vegetable oil consumed under the Ghee Corporation's new blend specification.

The price advantage soybean oil now holds over palm oil is expected to continue until Malaysian palm oil production begins to increase and stock levels begin to be replenished. The competitive position that soybean oil now holds over palm oil is also expected to affect vegetable oil purchases by other importing countries.

BRAZIL's concern over declining world soybean and product prices has led to action by the Foreign Trade Division of the Bank of Brazil (CACEX) to temporarily suspend export registration for new crop soybeans and products. Currently, Brazil is attempting to formulate a cooperative marketing program with Argentina to "defend the world market price for Argentine and Brazilian soybeans." Possible further actions by CACEX include establishment of a minimum export price and/or improving the financing program for marketing the new crop. Much of the trade remains doubtful in regard to any joint market policy action by Brazil and Argentina since both countries need to maintain regular sales to raise much-needed foreign currency.

Based on latest available data for the period beginning Jan. 1, 1983, with comparisons for the same months in 1982, net imports of soybeans and products by 10 SELECTED MARKETS amounted to 19.2 million tons soybean meal equivalent (SME) and 3.3 million tons in terms of oil. Compared with the same months a year ago, net imports in terms of SME were up slightly, but oil equivalent imports were down by 2.7 percent.

Combined exports of soybeans and products from the United States, Brazil and Argentina since Dec. 1, 1982, increased to 36.4 million tons SME, up slightly from the same months a year earlier. Combined exports of soybeans and oil from the three producer-exporter countries totaled 6.6 million tons, oil basis, down 3.7 percent from the same months a year earlier.

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Soybean and product trade in terms of SME and oil for specified exporting and importing countries are as follows in million tons:

Country	Period	Total as Oil 1982	1983	Total as Meal 1982	1983	1983 Annual Change 1982	1983
EXPORTS: Dec. 1982 thru							
U.S.	Nov. 83	5.38	4.90	26.38	24.87	-0.48	-1.51
BRAZIL	Nov. 83	1.02	1.15	8.13	9.18	0.13	1.04
ARGENTINA	Sep. 83	.42	.51	1.91	2.40	0.09	0.49
TOTAL EXPORTS		6.82	6.56	36.43	36.45	-0.25	0.02
NET IMPORTS: Jan 83 thru							
BEL-LUX	Aug. 83	.08	.09	.64	.58	0.01	-0.06
DENMARK	Sep. 83	.06	.05	.97	1.02	-0.01	0.05
FRANCE	Nov. 83	.10	.08	3.69	3.65	-0.02	-0.04
ITALY	Oct. 83	.24	.25	1.91	2.21	0.01	0.30
NETHERLANDS	Oct. 83	.23	.18	1.67	1.42	-0.05	-0.25
U.K.	Oct. 83	.25	.17	1.80	1.43	-0.08	-0.37
GER FED REP	Nov. 83	.45	.39	3.01	2.66	-0.06	-0.35
SPAIN	Nov. 83	.06	.11	2.01	2.08	0.05	0.07
PORTUGAL	Sep. 83	.02	.02	.36	.39	-0.00	0.02
JAPAN	Nov. 83	.72	.81	3.13	3.79	0.09	0.66
SUBTOTAL		2.21	2.15	19.21	19.24	-0.06	0.03

Compiled from unrounded data.

Japan, Spain and Italy were the only specified countries to register net import expansion in terms of both oil and meal.

During January 1984, soybean meal prices, basis Decatur, were up 12 percent from the same month a year ago while Decatur soybean oil prices registered a 72 percent gain during the same period.

DAIRY, LIVESTOCK AND POULTRY

AUSTRALIAN cattle herd rebuilding is expected to begin in 1984, according to the U.S. agricultural counselor in Canberra. A lower level of beef slaughter is expected to be partially offset by an increase in average animal slaughter weights, largely because of significantly improved pasture and feed supply conditions. Beef production in 1984 is forecast at 1.32 million tons. Production in 1983 totaled 1.40 million tons, 17 percent below the 1982 level of 1.68 million. The rebuilding of cattle herds may be constrained by expected greater financial attractiveness of sheep and crop production.

Demand for sheep for restocking purposes, plus weak overseas demand for mutton in 1983, resulted in the lowest level of sheep slaughter in many years. Mutton and lamb production totaled 450,190 tons, 19 percent below a year ago. Flock rebuilding in 1983 increased 1 percent, greater than earlier anticipated, with year-ending sheep numbers totaling 134.5 million head. In 1984, sheep inventories are projected to be 2.2 percent larger.

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Australian milk production in 1983 reached 5.9 million tons, 11 percent above 1982 despite drought conditions and a slight decline in dairy cows in milk. In 1984 milk production is forecast to rise for the third consecutive season, resulting in domestic overproduction. The breaking of the drought and investment in production-improving technology are the main factors contributing to the expected increase in milk output. Most of the increase in milk output will be utilized in the manufacture of butter and nonfat dry milk (NFDM).

JAPANESE broiler production reached 1.135 million tons in 1983, a 5-percent increase from a year ago. Broiler imports, of which 64 percent were of U.S. origin, remained at the previous year's level. According to the U.S. agricultural counselor in Tokyo, production in 1984 is expected to expand again, but the government is attempting to limit the increase to 2 percent. While Ministry of Agriculture guidelines are not mandatory, most producers incorporate them into their production plans in order to remain eligible for supplementary payments from the broiler stabilization fund. Growing demand from Japanese restaurants and hotels, in conjunction with reduced availability of often preferred Thai broilers, has encouraged domestic producers to surpass broiler production levels desired by the Japanese government.

Milk production in WEST GERMANY during 1983 was reported at 27 million tons, 6 percent above the 1982 level. Increased productivity and greater cow numbers each accounted for about half the increase. Increased feeding of dairy compounds and other concentrates facilitated a high productivity level throughout all of 1983, despite a severe drought that hurt pastures and fall forage supplies. Only a moderate production increase is expected in 1984, according to the U.S. agricultural counselor in Bonn, because of higher concentrate prices and lower roughage supplies than in 1983, along with little chance of another large EC milk price increase.

Butter and nonfat dry milk production were up sharply in 1983, each by about 25 percent as dairies took advantage of favorable prices set by the EC intervention system. Production for 1983 totaled 630,000 tons of butter and 730,000 tons of NFDM. Cheese production in 1983 remained at the 1982 level of 460,000 tons. Should milk production increase as forecast, production of butter, cheese and NFDM in 1984 are expected to increase moderately.

TOBACCO

GREECE has been authorized by the EC Commission to adopt certain measures regarding imported cigarettes in order to help protect the Greek industry. The decision is largely an extension of one taken in February 1983 to limit and/or monitor imports of cigarettes and other items for one year. The reason for the action includes the recent shift in demand toward American-type cigarettes for which Greek production has not been geared. As a result, until Oct. 31, 1984, imports under category 24.02 originating in or coming from the member states are to be limited to 1,100 tons. Imports of cigarettes from non-member states are to be monitored.

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In the UNITED KINGDOM, British-American Tobacco Company (BAT) has decided to close the company's cigarette manufacturing and sales operation. Reasons given for the closing included rising taxes and falling demand. This will result in a loss of 1,840 jobs in the U.K. tobacco industry. BAT has lost 53 million pounds sterling in its U.K. cigarette operation over the past five years. The change in the way taxes were charged on cigarettes from tax on the weight of tobacco to an end product tax left BAT with no recognized brand with which to exploit the high growth king-size cigarette market.

FRUITS AND NUTS

GREEK raisin production for 1983/84 is estimated at 105,000 tons, 9 percent above the October USDA estimate of 96,500 tons (WR 44-83) and 40 percent greater than the 1982 volume of 75,000 tons.

COFFEE, TEA AND COCOA

WORLD cocoa production for 1983/84 is estimated at 1.58 million tons, 4 percent less than the estimate made in October 1983 but 3 percent more than 1982/83 output. A severe, prolonged drought, coupled with bush fires in West African countries, were the major reasons for lower than expected production. Deteriorating growing conditions prompted a special survey of Cameroon, Ghana, Ivory Coast and Nigeria, resulting in an interim report released Dec. 14, 1983 (see WR 50-83).

The Ivory Coast's 1983/84 crop consists of smaller than normal bean size due mainly to premature ripening of pods caused by dry weather; however, it is now forecast to exceed by 11 percent the severely stricken crop of a year ago. Ghana's 1983/84 crop dropped sharply as both yields and harvested area were reduced. Drought and an extended harmattan (a seasonal hot dry wind) cut yields, while area losses were attributed to bush fires and diversion of land to food crops rather than replacing aged trees. A recovery is not expected until 1985 or 1986, when damaged trees have time to recover and new plantings begin to bear. In Cameroon and Nigeria, the decline in cocoa production was caused by drought, with bush fires destroying some cocoa plantings in Nigeria.

South American 1983/84 cocoa production is estimated to be up by 4 percent from the previous harvest. In Brazil, output could increase 3 percent as a result of a much improved Bahia main crop. The mid (temporao) crop is not expected to exceed last year's level. In Ecuador, output is expected to rebound from last year's poor yields caused by excessive rains, humidity and fungus infestations.

Asian production in 1983/84 is estimated to be up 20 percent as a result of expanding output in Malaysia, where production is expected to reach a record high of 90,000 tons, up 29 percent from a year earlier. Malaysia's new agricultural policy announced on Jan. 12, 1984, specified cocoa as a priority expansion crop. Production levels of 200,000 tons within the next decade are now considered possible.

Production for major countries and regions is estimated as follows in 1,000 tons:

Country/Region	1982/83 1/	1983/84 1/
Africa:		
Ivory Coast 2/	355.0	395.0
Ghana	178.0	155.0
Nigeria	154.0	150.0
Cameroon	106.0	100.0
Other	48.9	51.7
Total	841.9	851.7
South America:		
Brazil	339.0	350.0
Ecuador	55.0	62.0
Colombia	40.0	42.0
Other	25.0	25.6
Total	459.0	479.6
Central America/Caribbean:		
Mexico	43.0	40.0
Dominican Republic	40.0	41.0
Other	19.8	18.7
Total	102.8	99.7
Asia/Oceania:		
Malaysia	70.0	90.0
Papua-New Guinea	28.0	30.0
Other	22.1	24.6
Total	120.1	144.6
World Total	1,523.8	1,575.6

1/ October-September crop year. 2/ Includes cocoa marketed from Ghana.

Selected International Prices

Item	:	Feb. 21, 1984	:	Change from	:	A year
	:		:	previous week	:	ago
ROTTERDAM PRICES 1/		\$ per MT		\$ per bu.		\$ per MT
Wheat:						
Canadian No. 1 CWRS-13.5%12/		197.00		5.36		+ .50 198.00
U.S. No. 2 DNS/NS: 14%.12/		189.50		5.16		- .50 169.50
U.S. No. 2 S.R.W.....		152.00		4.14		+3.50 159.50
U.S. No. 3 H.A.D.12/.....		188.00		5.12		+1.00 169.00
Canadian No. 1 A: Durum.12/		201.00		5.47		-3.00 186.00
Feed grains:						
U.S. No. 3 Yellow Corn....		148.50		3.77		+1.50 132.00
Soybeans and meal:						
U.S. No. 2 Yellow.....		290.30		7.90		+9.80 241.00
Brazil 47/48% SoyaPellets 4/		235.00		--		+9.00 229.00
U.S. 44% Soybean Meal.....		224.00		--		+9.00 214.00
U.S. FARM PRICES 5/						
Wheat.....		120.88		3.29		-1.47 131.16
Barley.....		97.83		2.13		0 67.98
Corn.....		118.11		3.00		-1.58 102.76
Sorghum.....		103.40		4.69 4/		-1.98 101.41
Broilers 7/.....		1349.00		--		- .66 N.A.
EC IMPORT LEVIES						
Wheat 8/.....		83.45		2.27		+3.30 107.70
Barley.....		64.25		1.40		+11.15 113.15
Corn.....		58.15		1.48		+4.45 96.80
Sorghum.....		69.90		1.78		+5.10 93.55
Broilers 7/ 9/ 11/.....		170.00		--		+3.00 316.00
EC INTERVENTION PRICES 10/						
Common wheat(feed quality)		176.50		4.80		+2.90 186.95
Bread wheat (min. quality)10/		192.50		5.24		+3.15 205.50
Barley and all						
other feed grains.....		176.50		--		+2.90 186.95
Broilers 7/ 9/.....		1166.00		--		+7.00 1080.00
EC EXPORT RESTITUTIONS (subsidies)						
Wheat		38.85		1.06		+6.15 76.30
Barley.....		37.35		.81		+4.85 89.00
Broilers 7/ 9/ 11/.....		134.00		--		+3.00 214.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine. 3/ Based on selected major markets and adjusted to reflect farm prices more closely. 4/ Hundredweight (CWT). 5/ Twelve-city average, wholesale weighted average. 6/ Durum has a special levy. 7/ EC category--70 percent whole chicken. 8/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 9/ F.o.b. price for R.T.C. broilers at West German border. 10/ Reference price. 11/Reflects exchange rate change and not level set by EC. 12/ April-May shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis March delivery.

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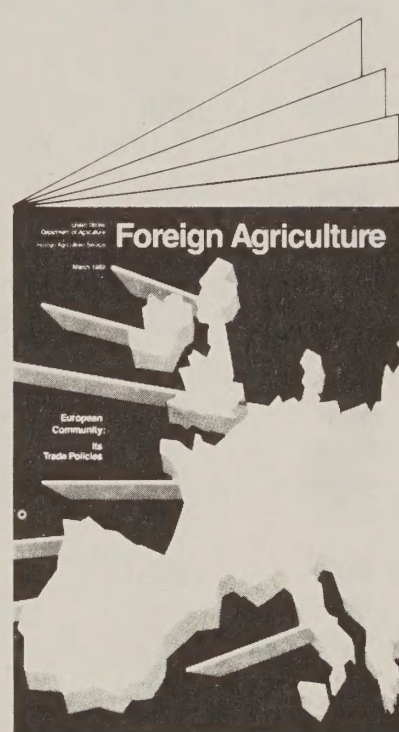
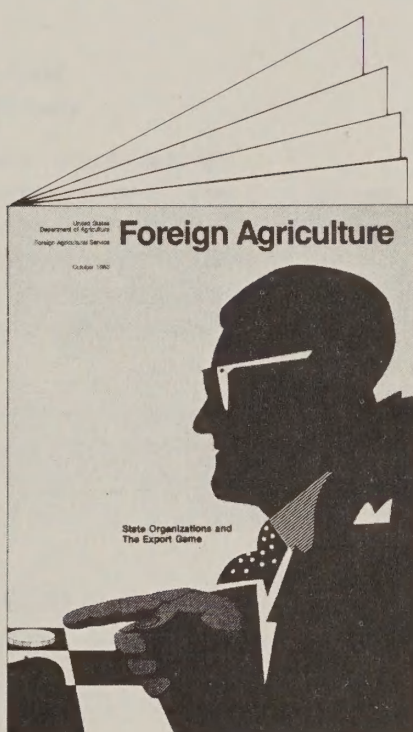
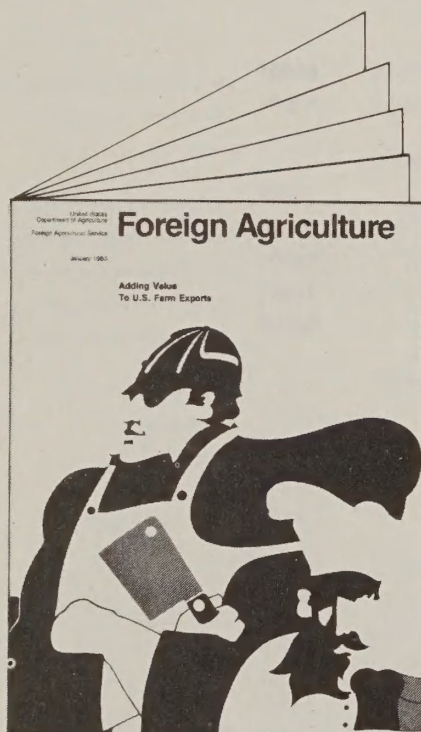
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